



The purpose of this tool is to provide the **Kansas Buyer role** with an overview of the **Purchase Order page**, and its functionality in SMART.



Foundation Information

It is important to know and to understand that a **Purchase Order** must:

Have a **PO Status** of “**Approved**”,

Have a **Budget Status** of “**Valid**”,

AND

Have the '**Hold From Further Processing**' checkbox **unchecked**

Before the Purchase Order can be “**Dispatched**” (sent) to the vendor.

START:

Navigate to the **Purchase Order** page:

Purchasing > Purchase Orders >
Add/Update POs > **Purchase Order**
page

Click on the “**Find an Existing Value**” tab.

Enter the desired criteria,
and then click the **Search**
button (at the bottom left of the page).

Menu

- ▼ Purchase Orders
 - ▷ Stage/Source Requests
 - ▷ Acknowledgements
 - ▷ Manage Change Orders
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 - **Add/Update POs**
 - Approve Amounts
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Purchase Order
Enter any information you have and click Search. L

Find an Existing Value | **Add a New Value**

Business Unit: = [17300] [Search]

PO ID: begins with []

Purchase Order Date: = [] [Calendar]

PO Status: = [] [Dropdown]

Short Vendor Name: begins with [] [Search]

Vendor ID: begins with [] [Search]

Vendor Name: begins with [] [Search]

Buyer: begins with [] [Search]

Buyer Name: begins with [] [Search]

PO Type: = [] [Dropdown]

Purchase Order Reference: begins with []

Hold From Further Processing ☐

☐ **Case Sensitive**

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Please do NOT use the “Add a New Value” tab.

You must enter the Business Unit (defaults) AND at least one other value in the search criteria fields BEFORE clicking the Search button.

If you entered several Search Criteria, or a range of Search Criteria, your **Search Results** will be returned to you at the bottom of the page in a grid format (as shown in the screenshot below):

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#)

First 1-100 of 300 [Last](#)

Business Unit	PO ID	Purchase Order Date	PO Status	Short Vendor Name	Vendor ID	Vendor Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing
17300	0000001160	02/13/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001159	02/12/2010	Approved	MOM'S DESI-001	0000000001	Mom Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001158	01/26/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001157	01/26/2010	Open	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001156	01/25/2010	Approved	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001155	01/25/2010	Open	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001154	01/25/2010	Open	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001153	01/25/2010	Open	ROBBIE DES-001	0000000010	Robbie Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001152	01/25/2010	Open	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001151	01/24/2010	Open	KAREN SUPP-001	0000000009	Karen Supplies Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001150	01/24/2010	Open	THOMAS TIR-001	0000000085	Thomas Tires Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001149	01/23/2010	Approved	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001148	01/23/2010	Open	ANDY DESIG-001	0000000008	Andy Design Shop	COLBIE	Colbie Contact General	(blank)		N
17300	0000001147	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001146	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001145	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001144	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001143	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001142	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001141	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001140	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001139	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001138	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001137	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N
17300	0000001136	01/21/2010	Dispatched	ANDY DESIG-001	0000000008	Andy Design Shop	FMSKHAFNER	Kurt Hafner	General	(blank)	N

Select the desired result from the Search Results list by clicking on it. Clicking on a specific result will directly open the **Maintain Purchase Order – Purchase Order** page for that result.

Alternatively, if you entered a specific Purchase Order number, the **Maintain Purchase Order – Purchase Order** page will open directly (as shown in the screenshot below):

Maintain Purchase Order

Purchase Order

Unit: 17300 PO Status: Open

PO ID: 0000010817 Budget Status: Not Chk'd

Copy From:

☐ Hold From Further Processing

▼ Header

*PO Date: 03/12/2013 [Vendor Search](#)

Vendor: KANSASFEN-001 [Vendor Details](#)

*Vendor ID: 0000012700 KANSAS FENCING INC

*Buyer: DA00DMS David M Stueve

PO Reference:

Receipt Status: Not Recvd

*Dispatch Method: Email

Amount Summary

Merchandise: 15,874.00

Freight/Tax/Misc.: 0.00

Total Amount: 15,874.00 USD

[Header Details](#) [PO Activities](#) [Edit ShipTo Comments](#)

[PO Defaults](#) [Document Status](#) [Bidder Preferences](#)

[Add Comments](#) [Requisitions](#)

Add Items From **Select Lines To Display**

[Purchasing Kit](#) [Catalog](#) [Item Search](#) Line: To:

Lines [Customize](#) [Find](#) [View All](#) First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Security Fence for KDOT -	1.0000	LOT	301520	15,874.00000	15,874.00	Active

[View Printable Version](#)

[Category Search](#) *Go to:

Maintain Purchase Order			
Purchase Order			
Unit:	17300	PO Status:	Open  
PO ID:	0000010817	Budget Status:	Not Chk'd 
Copy From:	<input type="text"/>	<input type="checkbox"/> Hold From Further Processing	
▼ Header			

Maintain Purchase Order – Purchase Order Page

Unit: Contains the five digit business unit number for the Agency in SMART (which is comprised of the 3 digit State of Kansas Agency number with two zeros at the end).


PO ID: Contains the ten digit Purchase Order Identification Number. This Purchase Order ID Number is assigned to the Purchase Order by SMART when the auto sourcing batch process is completed successfully.


(The Auto Sourcing batch process is an hourly batch process which selects the final 'Approved' requisitions from the e-Procurement module in SMART, and turns them into a "purchase order" in the Purchasing module of SMART).


Copy From: The State of Kansas is not using this functionality. ***Please do NOT use this field.***

PO Status: The PO Status (Purchase Order Status) field contains the current status of the Purchase Order in SMART. There are several statuses that may be displayed in this field:

Open: The PO is in an 'Open' status. The PO is waiting to be reviewed, edited, and 'Approved' by the **Kansas Buyer** role.

 **Note:** It is important to know and understand that a **Kansas Buyer** role can only **update** PO's which have been assigned to **their own Buyer ID** (which is the same as their SMART User ID). An **Agency Buying Administrator** role is able to update **ALL** PO's for their Agency.

Approved: The PO has been manually 'Approved' by the Kansas Buyer role. (The Kansas Buyer clicked on the **Approve PO** icon located to the right of the **PO Status** field: ). 'Approved' PO's are eligible for the Budget Checking process.


 **Note:** The **Budget Checking batch process** runs hourly from 9:00 am – 4:00 pm, Monday – Friday on business days, and overnight as part of the nightly batch processes.

On Hold: The PO has been placed on a manual hold (Refer to Page 5 of this document).

Dispatched: A PO can only be 'Dispatched' (sent) to a Vendor when:

- The PO has been manually 'Approved' by the Kansas Buyer role.
- The Budget Checking process has successfully completed, and has a "Valid" status (i.e.: No "Error" occurred during the Budget Checking process).
- The 'On Hold' check box is **NOT** checked.

The PO Status changes to 'Dispatched' **AFTER** the PO has been sent to the Vendor.


 **Note:** Additional information pertaining to the dispatching of PO's is contained in the 'Reviewing and Approving POs' training guide (which is currently under construction) and also in the Purchase Orders - Job Aid: 'Modifying PO Email & Fax Destinations'.

Maintain Purchase Order			
Purchase Order			
Unit:	17300	PO Status:	Open  
PO ID:	0000010817	Budget Status:	Not Chk'd 
Copy From:	<input type="text"/>	<input type="checkbox"/> Hold From Further Processing	
▼ Header			

Maintain Purchase Order – Purchase Order Page


Closed: PO's may be manually 'Closed' by an **Agency Buying Administrator** role (using the *PO Reconciliation Workbench*).

 Please refer to the *Purchase Orders job aid* "**Manual PO Close Process**" additional information.

 **Note:** It is important to know and understand that Canceled PO's will at some point change from a header status of 'Canceled' to a header status of 'Closed'. The PO line status will indicate if the PO line was 'Canceled' or 'Closed'.

If your Agency has a PO that has been 'Closed' and needs to be re-opened, please contact your **Agency Security Liaison**. The Liaison must submit a *Service Desk request* asking for the PO to be re-opened.

Cancel PO icon: The **red 'X' icon** at the top right of the page is the '**Cancel PO**' button. Clicking this icon prompts SMART to cancel the PO.

 **Note:** It is important to know and understand that **the cancellation of a PO CAN NOT be reversed** in SMART. Therefore judicious use of this button is recommended, and only AFTER you have confirmed that the PO will NEVER need to be used again.


The cancellation of a PO immediately **releases any encumbered monies** and returns them to your Agency's Operating budget (using the Fund/Budget Unit/Budget Period combination contained within the Distribution lines of the PO).

Budget Status: The **Budget Status** field contains the current 'Budget Checking status' of the Purchase Order in SMART. There are several statuses that may be displayed in this field:

Not Chk'd: Indicates that the PO has not been through the budget checking process yet.

Valid: This budget checking status indicates that the PO has been successfully budget checked and has passed all the ChartField and Budget validations during the Budget Checking process. The PO is now eligible to be '*Dispatched*' to the Vendor.

Error: This budget checking status indicates that the PO has been budget checked and that one or more ChartField / Budget 'Error/s' have been identified. To view the Budget Status error/s, click the 'Error' link in the Budget Status field. These 'Error/s' must be manually resolved **BEFORE** the PO can be submitted for the budget checking process again. The PO is **NOT** eligible for 'dispatching' to the vendor until the Budget Status of 'Valid' status is achieved.


Maintain Purchase Order			
Purchase Order			
Unit:	17300	PO Status:	Open  
PO ID:	0000010817	Budget Status:	Not Chk'd 
Copy From:	<input type="text"/>	<input type="checkbox"/> Hold From Further Processing	
▼ Header			

Maintain Purchase Order – Purchase Order Page

'Hold From Further Processing' checkbox:

This checkbox is manually selected to place the PO on hold and to change the **PO Status** to "**On Hold**".

A PO may be put on hold at the discretion of the **Kansas Buyer** to whom the PO is assigned, by the **Agency's Buying Administrator**, or by a **Central Purchasing Officer**.

 **Note:** It is important to know and understand that any PO with a PO Status of "**On Hold**", is unable to be used within SMART for any purpose.

PO's placed "**On Hold**" are prevented from entering any batch processes, including budget checking, and dispatching to the vendor. Until the PO Status of "On Hold" is manually changed, the PO will not be able to move forward within SMART; it can NOT be used on any transactions in SMART; nor can it progress through any batch processes within SMART.

To remove the "On Hold" status from a PO, simply deselect the '**Hold From Further Processing**' checkbox, and '**Save**' the PO.